Library Engagement Assessment Process

LEAP

Introductions

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The LEAP Training

- The purpose LEAP
  - Enhance your understanding of the variety, needs, resources, and skills of Boomers.
  - Match Boomers to your needs, plans, resources, and capacity.
- This will help you to:
  - Plan new services – both for Boomers and others
  - Enhance or adapt current services
  - Garner resources for your library

How It Will Work

- What we will do for the next few hours

- What you will take with you

- How we will work with you

- New grant opportunities

Why Assess?

Why LEAP?

- LEAP is an engagement assessment not a needs assessment
- Why engagement?
  - Moves beyond one way service assessment
  - Creates deeper knowledge of complex population
  - Creates collaborations
  - Garners resources for libraries

Overview of LEAP Steps

1. Describe your Boomers
2. Identify library needs & resources
3. Prioritize segments of your Boomer population
4. Assess priority Boomer segments
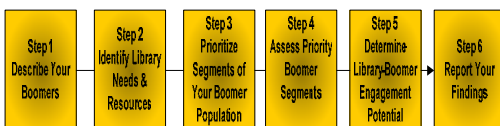5. Determine library-Boomer engagement potential
6. Report your findings

LEAP STEPS

Step 1 Describe Your Boomers	Step 2 Identify Library Needs & Resources	Step 3 Prioritize Segments of Your Boomer Population	Step 4 Assess Priority Boomer Segments	Step 5 Determine Library-Boomer Engagement Potential	Step 6 Report Your Findings

Who Are The Boomers?

- Boomers are not all the same
  - Richer and poorer
  - Different races and ethnicities
  - Men and women
  - Gay and straight
  - Older (leading edge Boomers 53-62)
  - Younger (trailing edge Boomers 43-52)
  - Diverse needs, resources, and skills.

Boomer Eras

- Leading edge Boomers were born between 1946 and 1954 and are **53-62** years old.

- Trailing edge Boomers were born between 1955 and 1964 and are **43-52** years old.
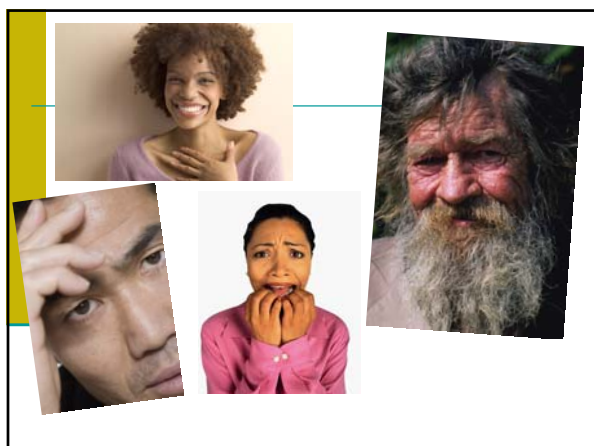
STEP 1

Describe Your Boomers

Step 1: Describe your Boomers

- In this LEAP step there are four activities:
  - Activity a. Create a picture of your resident Boomer population.
  - Activity b. Create a picture of your daytime Boomer population.
  - Activity c. Identify the major segments of your Boomer population.
  - Activity d. Gather information on segments of your Boomer population.
- At the end of this step you will have a good general picture of the Boomers in your area.

Step 1, Activity a. Create a demographic picture of your <u>resident</u> Boomer population.

- You may already have good information

- This is the time to expand and deepen it

- Use locally available information resources

- Other information resources

Data on Boomers

- Important dimensions:
  - Numbers of Boomers
  - Percentage of each Gender
  - Distribution by Ethnicity
  - Primary Languages Spoken
  - Distribution by Socio-Economic Status (SES)
  - Geographic Distribution

Demographic Resources

- <u>U.S. Census. Go to *Population Finder*</u>
  http://www.census.gov/

- <u>American Fact Finder</u>
  http://factfinder.census.gov/home/saff/main.html?_lang=en

- <u>California State Data Center Products and Services</u>
  http://www.dof.ca.gov/HTML/DEMOGRAP/SDC/SDC-Products.php

- <u>The National Association of Counties (NACo)</u>
  http://www.naco.org/Content/NavigationMenu/About_Counties/Data_and_Demographics/Dataand_Demographics.htm

Display your information

Local Boomer Demographic Profile

Gender		Ethnicity/Race					Languages Spoken and Percentages[3]	Income Quintile[4]					Geographic Concentration[5]	Age Group[6]	
Male	Female	Non-Hispanic White	African American	Hispanic	AI/AN[1]	API[2]		1st	2nd	3rd	4th	5th		Born 1946 - 1955	Born 1956 - 1964
# or %															

[1] American Indian/Alaska Native
[2] Asian/Pacific Islander
[3] Indicate each language and percentage of the total who speak it in a separate row.
[4] This is one way of indicating income distribution (i.e., from the bottom 20% - 1st quintile - through the top 20% - 5th quintile. Use other indicators of income distribution if they are more readily available.
[5] Use locally relevant geographic divisions - such as zip codes, census tracts, or named neighborhoods – for which data, including local knowledge, are available.
[6] This refers to age group within the Boomer population, born from 1946 through 1964.

Step 1, Activity b. Create a picture of your daytime boomer population

- Why the daytime population?
  - Spend significant time in your jurisdiction
  - May have needs
  - May have skills and resources

- Have employers with resources

Step 1, Activity b. Resources

- Chamber of Commerce (CoC)
- For governmental organizations - personnel and information offices.
- Non-profit organization information:
  - United Way
  - Secretary of State in Sacramento
  - The Foundation Center
  - And always, the library!
  - Others???

Step 1, Activity b.
Display your information

Local Organizational Demographic Profile

Name of Organization:
Purpose/products:
Key contacts:
Community involvement (current/interest):

	Gender		Ethnicity/Race					Languages Spoken and Percentages[3]	Income Quintile[4]					Geographic Concentration[5]		Age Group[6]	
	Male	Female	Non-Hispanic White	African American	Hispanic	AI/AN[1]	API[2]		1st	2nd	3rd	4th	5th			Born 1946 – 1955	Born 1956 - 1964
# or %																	

[1] American Indian/Alaska Native
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Step 1, Activity c. Identify the major segments of your Boomer population.

- The demographic information will point to the major segments of the local Boomer population.

- Use your team's local knowledge to interpret the demographic information and define segments.

Step 1, Activity d. Gather information on segments of the local Boomer population.

- Expand your knowledge about the defined segments of the Boomer population.
- Gather information through other resources - they may include:
  - The library system
  - City/County government, non-profit organizations, and others.
- Remember that you are interested in needs, resources, and skills of all Boomers, so think broadly about who may have good information.

Diverse information

- It is likely that from this task you will gather diverse information about Boomers.

- Manage and display the information in the way that is most useful to your team.

Display your information

Local African American Boomer Demographic Profile

	Gender		Educational Level				Income Quintile[1]					Geographic Concentration[2]	Age Group[3]	
	Male	Female	Less than High School	High School	College	Post-Graduate	1st	2nd	3rd	4th	5th		Born 1946 - 1955	Born 1956 - 1964
Number or Percentage														

[1] This is one way of indicating income distribution (i.e., from the bottom 20% - 1st quintile - through the top 20% - 5th quintile). Use other indicators of income distribution if they are more readily available.
[2] Use locally relevant geographic divisions - such as zip codes, census tracts, or named neighborhoods – for which data, including local knowledge, are available.
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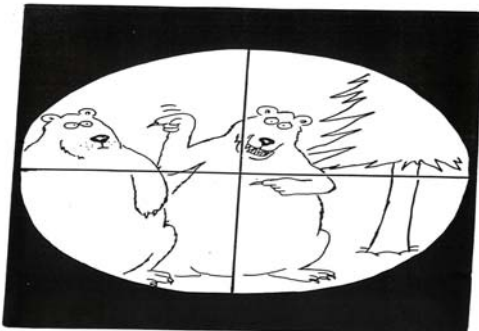NO, HE'S THE LEADING EDGE BOOMER, NOT ME!

STEP 2

Identify Library Needs & Resources

Step 2 Activities

- In this LEAP step there are four activities:
  - Activity a. Review library planning documents.
  - Activity b. Review and/or project library needs for services for currently served populations.
  - Activity c. Create a list of needed and desired resources and anticipated sources.
  - Activity d. Create a list of existing library capacities and capacities to develop.
- At the end of this step you will have a good picture of current and projected needs and capacities of your library.

Step 2: Identify your library's needs and resources.

- Create a clear picture of current and future library needs and library resources.
- Compile by drawing from library planning documents and the expertise of your library staff.
- Even if you have an inventory, it will be important to thoughtfully complete this step.
- **This is a time to think globally about how you would like to develop your library services.**
- Dream!

Step 2, Activity a. Review library planning documents.

- Review existing planning documents that are relevant to understanding library needs, capacities, and resources, such as:
  - Inventories of library needs and capacities compiled as part of planning processes;
  - Assessments of library capacities;
  - Results of user surveys;
  - Other?

Step 2, Activity b. Review and/or project library needs for services to currently served populations.

- Examine the most recent assessments and update as needed to include:
  - Your assessment of needs for service enhancement or expansion.

  - Utilize information compiled in "review of library planning documents", and from discussions with library personnel.

Step 2, Activity c. Create a list of needed and desired resources and sources

- Create a list of resources and sources for program development.
- Sample format:

Needed Resources & Potential Sources

Resource Needed	Potential Boomer Sources
Planning support	???
Resource development for library expansion	???
Library equipment	???
Specialized population outreach planning & implementation	???

Step 2, Activity d. Create a list of existing library capacities and capacities to develop.

- Create a final list of both your library's principal current capacities and the capacities you want to develop.
- Sample format:

Current Capacities	Capacities to Develop
Only Korean language support available	Vietnamese and Mandarin language support
Once monthly early childhood development assessments	Weekly early childhood development assessment capacity

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STEP 3

Prioritize Segments of Your Boomer Population

Step 3: Prioritize Your Boomer Segments

- One activity in Step 3, prioritizing the Boomer segments that you have identified.
- Remember:
  - Many may be interesting, but few should be chosen (for now).
  - You will have other opportunities to engage those you do not follow now.
- At the end of this step you will have an ordered list of Boomer segments.

Step 3, Activity a. Prioritize Boomer segments.

- Decide who is important to follow now.
- Issues that may be important in deciding priority:
  - Members of a group not engaged with the library
  - Greatest need group
  - Promising and needed skills and resources
- Consider in prioritizing:
  - Barriers or facilitators to engaging with a group, such as:
    - primary languages
    - geographic barriers
    - other issues
- Important to end up with solid, locally relevant reasons for priority decisions.

Displaying information

Prioritized Boomer Population Segments					
Name of Boomer Segment	Description of Segment	Facilitators to Engagement	Barriers to Engagement	Why Prioritized	Notes on Segment

STEP 4

Assess Priority Boomer Segments

Step 4 Activities

- There are five activities in Step 4.
  - Activity a. Identify means of making initial contact with a *sample* of the population.
  - Activity b. Decide how to gather information.
  - Activity c. Select questions to ask.
  - Activity d. Gather information.
  - Activity e. Analyze needs and resources of the prioritized segment.
- At the end of this step you will have in-depth knowledge of one or more Boomer segments.

Step 4, Activity a. Identify means of making initial contact with a *sample* of the population

- Possible means of making contact
  - Advertisements in segment gathering places (**note:** this may include the library)
  - Advertisements in local media, including: ethnic radio stations or other niche market media
  - Direct recruitment through influential individuals
  - Recruitment through segment organizations
  - Direct recruitment at your library through staff and users
  - Other means your team determines to be appropriate and cost and time effective.

Step 4, Activity b. Decide how to gather information.

- Focus Groups

- Telephone or web surveys

- Interviews

Pros & Cons

- Focus Groups
  - Good information, time friendly, inexpensive, but hard to ensure everyone gets to say all they want to say.
- Telephone or Web Surveys
  - Great information, but time intensive and potentially expensive.
- Interviews
  - Great information, time intensive and potentially expensive.

Step 4, Activity c. Select questions to ask

- Core recommended questions:
  - Do you currently use the library? If so, how and why? If not, why not?
  - How would you describe your library?
  - How does the library currently serve you?
  - What needs for information and services do you have?
  - How could the library engage you to use your skills and interests to serve the community through the library?
  - How can the library best engage you in library activities?
  - What would make this harder? Easier?
  - Are there other gatekeepers and opinion-makers that we should also approach?

Step 4, Activity d. Gather Information

- Conduct your focus groups, interviews or surveys.
  - If your segment is well defined, you will not need to do many.
  - You are looking for trends in the information, such as:
    - Types of services needed
    - Skills and resources
    - Means of engaging
    - Gatekeepers and opinionmakers

Step 4, Activity e. Analyze needs and resources of the prioritized segment

- Questions to consider:
  - What needs do they have that the library could address?
  - What needs do they have that are better addressed by other community agencies?
  - Could the library facilitate these connections?
  - What skills and resources do they have that could help the library?

STEP 5

Determine Library-Boomer Engagement Potential

Step 5 Activities

- There are four activities in Step 5.
  - Activity a. Review the information about your library's needs and resources.
  - Activity b. Match your library's capacities with the needs of the selected Boomer segment.
  - Activity c. Match your library's needs with the resources potentially available from Boomers.
  - Activity d. Determine most likely areas of Library-Boomer engagement to cultivate.

- At the end of this Step you will have a clear picture of how the library and your Boomer segment(s) can serve each other.

Step 5, Activity a. Review the information about your library's needs and resources.

- Review the outcome of Step 2.
  - Have new needs become clear?
  - Have you identified new resources or skills that might be available?
  - What new programs and services could you think about developing?
  - What new partners may you develop in the community?

Step 5, Activity b: Match your library's capacities with the needs of the selected Boomer segment.

Engagement Opportunity Matrix 1:

Library Capacities	Boomer Needs		

Step 5, Activity c: Match your library's needs with the resources potentially available from Boomers.

Engagement Opportunity Matrix 2:

Library Needs	Boomer Skills & Resources		

Step 5, Activity d: Determine areas of Library-Boomer engagement to cultivate.

- You now have a list of the areas of potential library-Boomer engagement
  - List based on sound analysis of needs and resources.
- Determine which of these has highest priority -
  - May require a priority-setting exercise like that outlined in Step 3, in which library personnel agree on criteria for setting priorities.
  - Potentials of greatest interest and urgency may stand out.
  - Document the basis for selection.

STEP 6

Report Your Findings

LEAP Reporting

- LTG will review the reports and prepare a summary of key findings for distribution in early May 2008.
- Why a report?
  - What you learn about your Boomers can help other libraries understand the State's Boomers better and inspire them to conduct their own LEAPs.

LEAP Reporting (continued)

- Report due on April 1, 2008
  - *A. Describe your LEAP activity.*
  - *B. Profile Your Local Boomers*
  - *C. Describe Your Library's Needs and Resources*
  - *D. Your Priority Boomer Segment(s)*
  - *E. Potentials for Library-Boomer Engagement*
  - *F. Conclusion*
  - *Describe any circumstances or events that made conducting your LEAP harder or easier.*
  - *Tell us how useful you found the TA provided and how it could have been better.*
  - *Describe ways in which you think LEAP in general could be improved.*
  - *How useful do you think the LEAP process was?*

Next Steps – Beyond LEAP

- Create a plan for engaging with high-priority Boomer population segment(s).
  - Activity a. Identify potential Boomer collaborators (individuals or groups) associated with high priority opportunities.
  - Activity b. Create a strategy for sharing the library's analysis of engagement opportunities with potential collaborators and forming working groups.
  - Apply for a targeted LSTA grant to implement an innovative engagement opportunity that you have identified through this process. Deadline for 08/09 LSTA grant is May 31, 2008.

LEAP!

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